

DRAFT WORKPLAN / OPEN ISSUES LIST**Information Sharing and Local Planning Assumptions Workgroup**Last Updated: 9/25/08

1.0	Deliverable: Increase understanding and transparency regarding development, review, and use of load forecasts for planning Priority = High; Urgency = Medium / high				
	Task	Status	Due Date	Lead / Key Contacts	Completed
1.1	Research load forecasting processes, methodologies, and uses for system planning in MI. Develop survey questions and administer survey to load serving entities, transmission owners, and RTOs.	Draft survey distributed 9/25/08; Comments due 10/17/08. Discuss comments at 10/28 meeting and finalize survey	12/15/08 (surveys completed)	Talberg, others?	
1.2	Convene meeting to discuss survey results, examine process for developing forecasts, and recommend process improvements to increase transparency and data exchange and address disputes, etc. Have presentations from LSEs, transmission owners, and RTOs on their roles related to forecasting and uses of forecasts, as applicable.	Planned for December meeting? Wrap-up process improvement recommendations, if any, by February 2009	February 2009?	Talberg	
1.3	Develop matrix with key information on different forecast types. Also, develop diagram on sources, inputs, and uses of various forecasts used by RTOs.	Drafts to be presented at December meeting	January 2009?	Talberg	
1.4	Examine forecasting needs for transmission reliability planning and facilitate ways to meet those needs.				
1.5	Understand impacts of load forecasting such as on loss of load expectation analyses for Michigan, generation and transmission.			Moser?	
2.0	Deliverable: Review and agree on expectations for MTEP 09 for Lower Peninsula, in terms of load forecast, process, and information exchange. Priority = High; Urgency = High				
	Task	Status	Due Date	Lead / Key Contacts	Completed
2.1	Reach consensus on load forecast for Lower Peninsula for MTEP 09 reliability models (2, 5 and 10 year models). Agree on cutoff date for forecast updates for MTEP 09 planning cycle.	Plan to discuss 10/28	1/1/2009	Chatterjee?	
2.2	Review MTEP 09 process and timing; reporting requirements; information needs and opportunities for comment and review; methods and timing for submitting information or data requests and providing responses; other expectations; if appropriate, memorialize expectations in writing.	Plan to discuss 10/28	1/1/2009		

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3.0	Deliverable: Discuss and attempt to reach consensus on application of planning criteria, methodologies, and assumptions Priority = High; Urgency = Medium				
	Task	Status	Due Date	Lead / Key Contacts	Completed
3.1	Review and discuss applicable planning standards, criteria and methodologies as applied to the Michigan system; Compare planning criteria among entities across MISO (and PJM?) footprint(s).				
3.2	Identify areas of disagreement or lack of clarity and resolve those issues if possible. If consensus reached, propose changes to criteria or assumptions if appropriate.				
3.3	Implement any changes in transmission planning process (project identification and review).		Prior to start of MTEP 2010		
4.0	Deliverable: Convene informational and policy forum on CEII and confidential data access issues Priority = Medium; Urgency = Low				
	Task	Status	Due Date	Lead / Key Contacts	Completed
4.1	Select date of forum.	not started	Mar-09		
4.2	Review key orders, agreements, and documents related to CEII and data access issues.				
4.3	Identify speakers/panels and key policy or implementation issues for discussion.		Apr-09		
4.4	Convene open forum.		Jun-09		